

Uploading Multiple Contacts Using Excel

COVID-19 Community Team Outreach

Administrators can upload multiple contacts or case patients at once using an Excel template:

Completing the Template

Utilize the template provided at the link on the right to complete **First Name, Last Name, County, State**, and any other info you have about your group of contacts or case patients per the guidance outlined in the [CCTO Glossary Job Aid](#). You do not need to complete all the fields and can leave unknown information blank. **Save your file as a .csv.** Any additional spaces or information in this template will be interpreted as blank contacts or errors by the system, so please use a new template for each upload.

Uploading from Excel

This functionality is on visible to users designated as administrators within the CCTO Tool. **Please note that we do not recommend using the "Import from Excel" button on the Contacts Tab, as this will not allow you to see where errors have occurred.**

1. Navigate to the gear icon in the top right corner and select "Advanced Settings."
2. Click the dropdown arrow next to "Settings" at the top of the screen. In the menu that appears, select "Data Management."
3. Select "Imports" to view the "My Imports" screen.
4. Click "Import Data" at the top of the screen to open the Import Wizard.
5. Click "Choose file" to upload your completed .csv template. Click "Next."
6. Click "Next."
7. Select "Default (Automatic Mapping)" from the Data Map list and then click "Next."
8. Select "Contact" from the dropdown and note that the "Success" message appears. Click "Next" and proceed to the data mapping process below.

1 "Advanced Settings"

2 "Data Management"

3 "Imports"

4 "Import Data"

5 Upload .csv template

6 "Next"

7 "Default"

8 "Contact" and "Next"

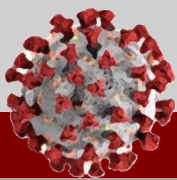
Under the **Contact Tracing and Movement and Monitoring** header in the **CD Manual**, download the appropriate file under **5. Contact CCTO Tool Import Template (Excel) or Case Patient CCTO Tool Import (Excel)**.

Before upload, remember to save this file as a .CSV.

These files contain data validation restrictions. Please note you may use the dropdowns provided for any fields that are not free text (e.g., gender, preferred method of contact, etc.).

The screenshot shows the Dynamics 365 interface with the following steps highlighted:

1. Advanced Settings
2. Data Management
3. Imports
4. Import Data
5. Upload .csv template
6. Next
7. Default
8. Contact and Next



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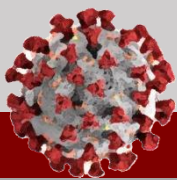
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Mapping and Submitting Your Upload

1. Confirm that the "Source Fields" from your .csv file have mapped as expected to the "Dynamics 365 Fields." Note that if the headers have been altered in any way, the information may not have mapped properly. All fields except "Test Date" (used for case patient upload only) should be mapped already.
2. If applicable, under "Test Date," select the second option for "Test Date" and then click "OK."
3. Click "Next." If prompted by your browser, hit "OK" to ignore unmapped fields, as these unmapped fields are supposed to be blank.
4. Click "Next" again.
5. Under "Allow Duplicates," we suggest choosing "Yes." If you choose "No," any duplicates detected, such as people with a last name or birth date already present in the system, may not be uploaded.
6. Set an owner as appropriate.
7. If you wish, you can add a name for your data map to save it as a default for future imports.
8. Click "Submit" and then "Finish" to close the window.

- 1 Confirm Mapping
- 2 Map "Test Result"
- 3 "Next"
- 4 "Next"
- 5 Allow Duplicates
- 6 Set Owner
- 7 Name Data Map
- 8 "Submit" and "Finish"



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Reviewing Import Results

1. After clicking "Finish" to close the window, your new upload will be immediately visible in the "My Imports" Screen.
2. Note the status column. If the file is large, you may need to refresh the page until the status reads "Completed."
3. If any errors occur, they will appear as counts in the "Partial Failure" or "Errors" columns. If you notice a nonzero value in these columns, you can review what occurred by clicking on your upload.
4. Clicking on your upload produces a profile screen that will allow you to drill into failures, successes, and partial failures itemized on separate tabs.
5. *This example shows an error that can occur if duplicate detection is not turned off and a new contact has the same full name as an existing contact. The new contact will not be uploaded. Please note that you should only attempt to re-upload records (contacts) that have failed and NOT the entire original file. Re-uploading the original file may result in duplicating successfully imported records.*
6. Successfully uploaded records will now appear normally in the Contacts Tab, assigned to the owner you selected during upload.

1 My Imports

2 3

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Contacts Upload Template v1_Test.02.csv

Import Source File

General Failures Success Partial Failure Related

Name: Contacts Upload Template v1_Test.02.csv Status: Completed

Created By: Mary Moran

Created On: 6/23/2020 3:40 PM Finished On: 6/23/2020

Properties

File: Contacts Upload Template v1_Test.02.csv Size: 619

Record Type: contact

Records Owned By: Mary Moran

Results

Successes: 1

Partial Failures: 0

Contacts Upload Template v1_Test.02.csv

Import Source File

General Failures Success Partial Failure Related

Full Name ↑

Test Testing

6.23 Upload Template_vTest.01.csv

Import Source File

General Failures Success Partial Failure Related

Import Logs

Log Ph... Description Column He... Column Val... Source Row Error Code More Information

1 Import ... 4 ...Will.Smith.805 St. Cl -2... 685 A record was not created or updated because a duplicate of t...

5

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Home Recent Pinned Apps Dashboards Contacts

My Active Contacts

First Name	Last Name	Employer	Job Title	Monitoring Status
Test	Testing	Test Inc.	Tester	---
Danny	Tanner	Wake Up San ...	---	---
Will	Smith	Fresh Prince, I...	Student	---
Vivian	Banks	UCLA	Doctor	---